Chapter 11

Employee Information

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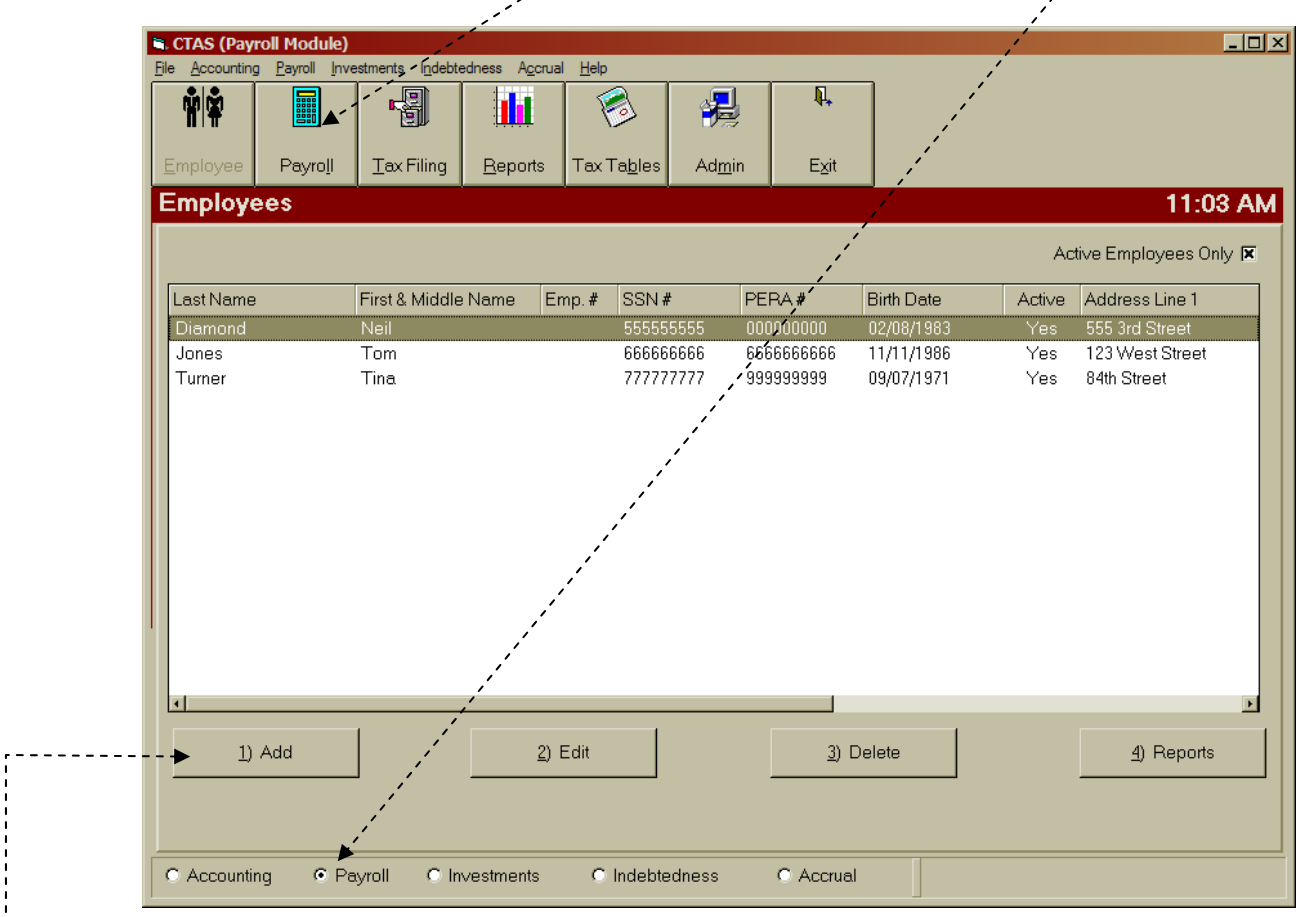
Employees: Accessing the Payroll System

To select the Payroll Module, click on Payroll on the task bar or click on the Payroll Radio button on the bottom of the screen.



Employees: Entering Employee Information

To Enter New Employees

Click the Add button on the Employees screen in the Payroll Module (above) to enter new employees to the system**.**

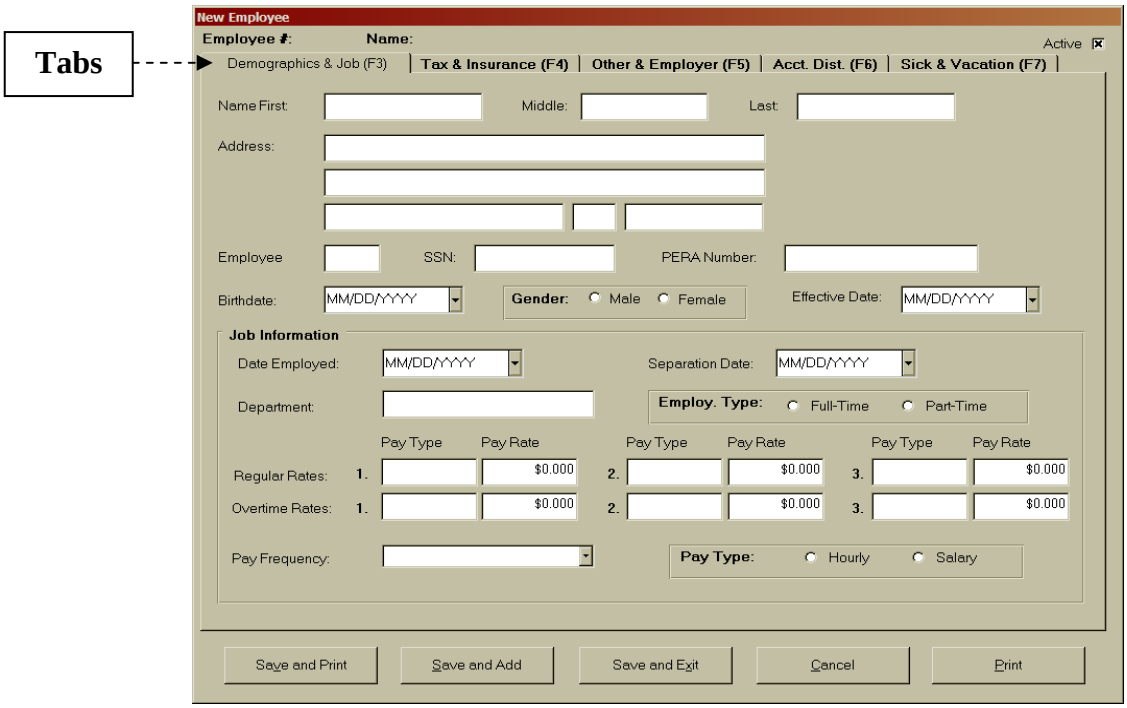
The New Employee screen will appear (see next page). The screen has 5 tabs, allowing you to enter the information for a new employee. The first four tabs should be completed before clicking the Save button to record the new employee.

Instructions for entering a new employee begin on the next page.

Employees: Entering Employee Information (continued)

Entering Information Into the Demographics & Job (F3) Tab

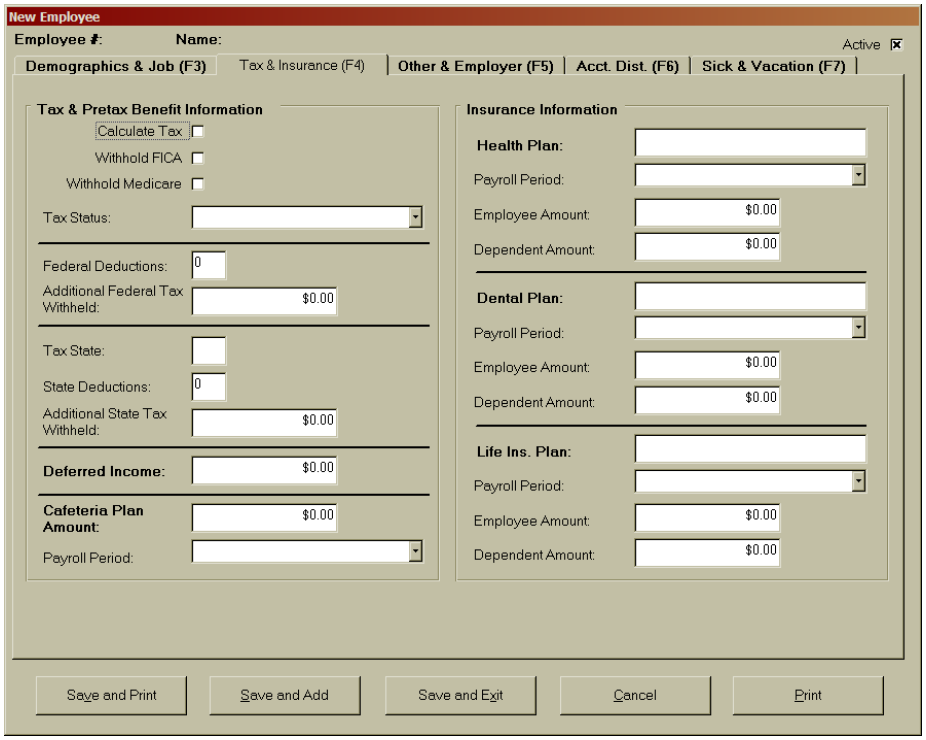
The New Employee screen opens on the Demographics and Job (F3) tab:



- Enter the employee's name, address and Social Security Number. The name must be entered as it reads on the employee's Social Security card. This information will be printed on the W-2.
- In the Employee box, assign and enter an employee number using a method of your choosing.
- Enter the Effective Date. This is the date the Pay Rates became effective.
- In the Job Information box, enter the Department (Supervisor, Clerk, Street, etc.)
- Enter the employee type by clicking either the Full-Time or Part-Time button in the Employ. Type box. Note: Town board members are part-time employees.
- Enter up to three Pay Types and Pay Rates. For example, a board member/councilperson could have Regular Rate 1 as the meeting rate, Regular Rate 2 as an hourly rate and Regular Rate 3 as a salary rate. If overtime rates are not calculated as time and a half, the overtime rate needs to be calculated and then entered.
- To Select Pay Frequency, click on the down arrow and highlight your choice.
- Click the Hourly or Salary Radio Button in the Pay Type box.
- Click the Save and Add button to enter information for more employees.
- When this screen is completed, click on the Tax & Insurance (F4) tab at the top of the screen to continue.

Employees: Entering Employee Information (continued)

Entering Information Into the Tax & Insurance (F4) Tab

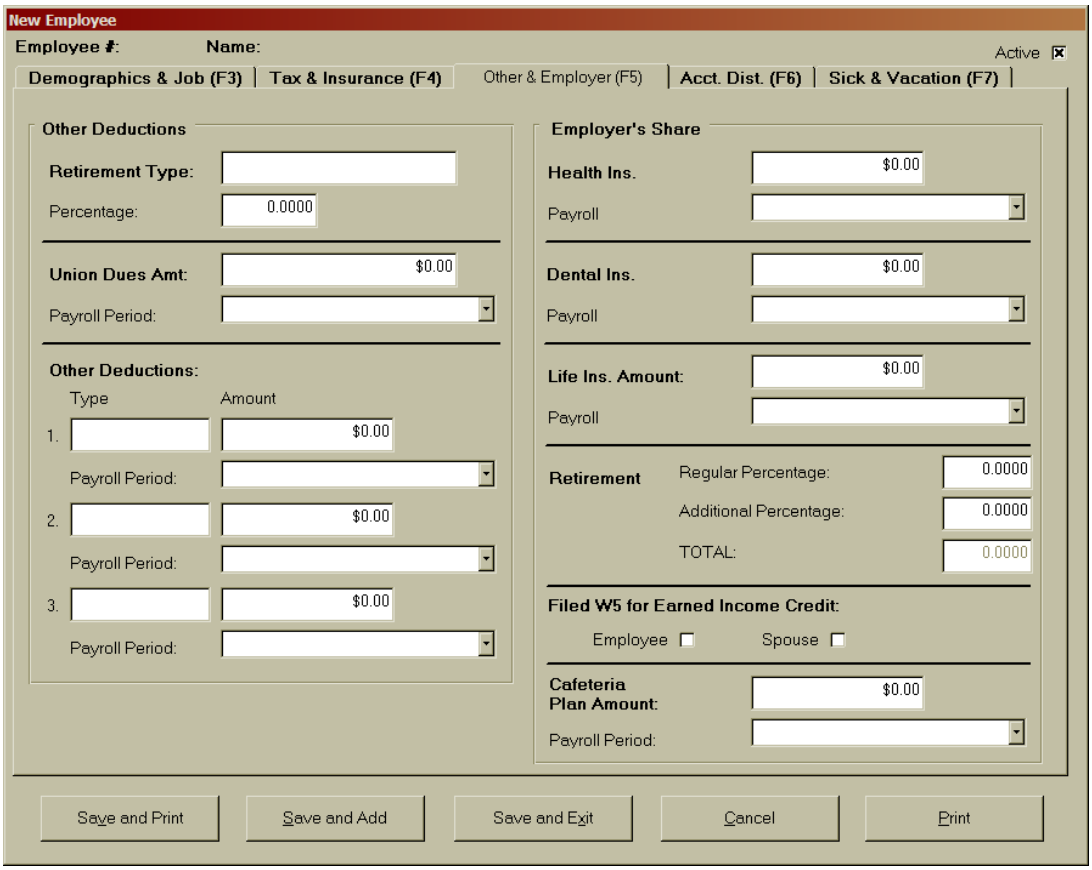


- In the Tax & Pretax Benefit Information column, click the Calculate Tax box to calculate the Federal and State Income Tax Withholding amount.
- If applicable, click the Withhold FICA and/or the Withhold Medicare Box.
- Select the Tax Status (Single or Married) from the dropdown menu.
- Enter the number of Federal Exemptions claimed on the W-4 in the Federal Deduction Field.
- Enter the Tax State. For Minnesota, enter MN.
- Enter the number of state exemptions claimed on the W-4 in the State Deduction Field.
- Deferred Income, Cafeteria Plan, and Insurance Information (in adjacent column) are amounts to be withheld from the employee's pay. The Deferred Income and Cafeteria Plan amounts are deducted before Federal and State income taxes are calculated.
- The Payroll Period fields allow you to indicate from which paychecks a deduction should be withheld. The first through the fourteenth of the month is the first pay period; the fifteenth through the twenty-eighth of the month is the second pay period; the twenty-ninth through the thirty-first of the month is the third pay period.
- Click the Save and Add button to enter information for more employees.
- Click on the Other & Employer (F5) tab at the top of the screen to continue.

Employees: Entering Employee Information (continued)

Entering Information Into the Other & Employer (F5) Tab

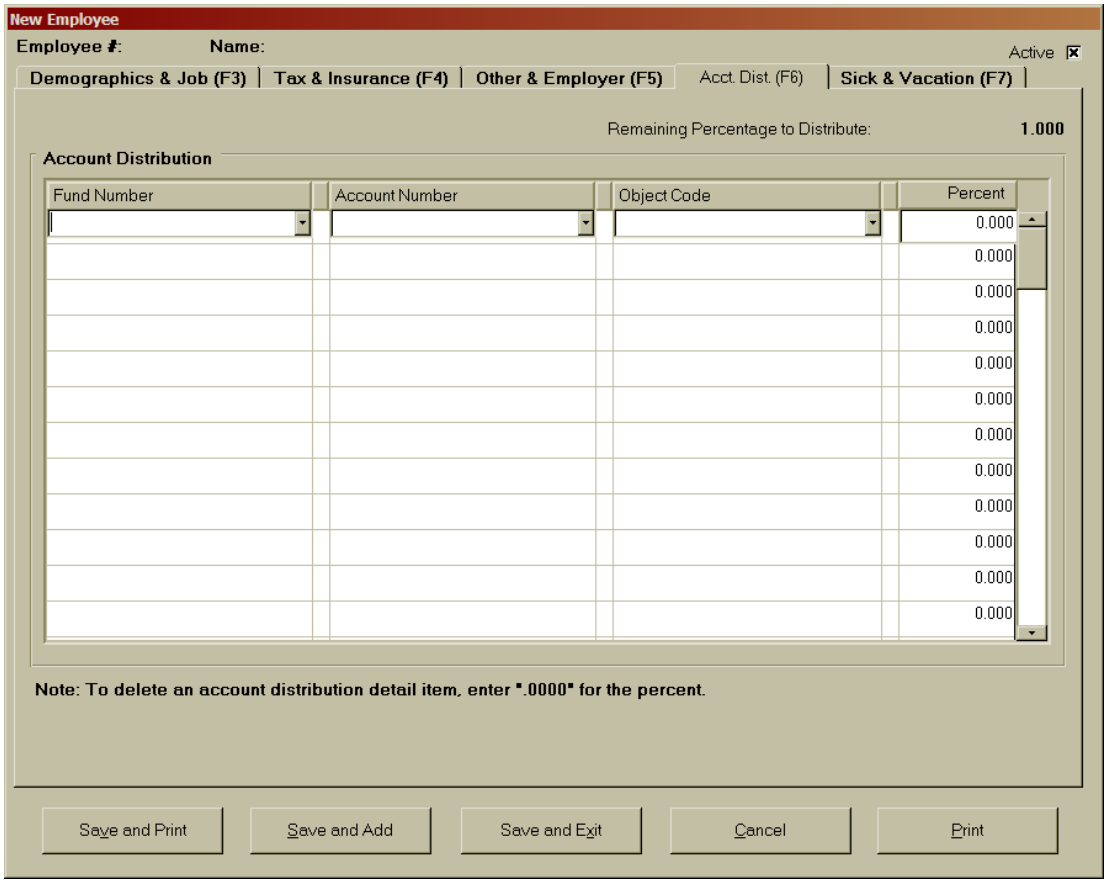
This screen is for Employee's Other Deductions and the Employer's Share of deductions.



- If an employee is paying into PERA, enter a type of plan in the Retirement Type field. Use this field to indicate which PERA plan the employee participates in (DCP, Coordinated, etc.).
- Enter the percentage to be withheld. This should be entered as a decimal. For example, to withhold 5%, enter 0.05 in the percentage field.
- Enter the Union Dues or any Other Deductions required to be withheld from an employee's pay in the appropriate fields.
- In the right column, enter the employer's share of any benefits. If the employee is paying into PERA, enter the percentage for the employer's share of the Retirement.
- Click the Save and Add button to enter information for more employees.
- When this screen is completed, click on the Acct Dist. (F6) tab at the top of the screen to continue.

Entering Information Into the Acct Dist. (F6) Tab

The fourth screen is for the Account Distribution:



All employee distribution records must equal 100%. On this screen, 1.00 is equivalent to 100%. This allows an employee's wages to be split among several categories. The percentages should be entered as a decimal. Also, the breakdown that is likely to occur the most often should be entered. The account distribution breakdown can be adjusted when entering the employee hours for the payroll period.

Note: At least one fund number, account number, object code and percentage must be entered for each employee.

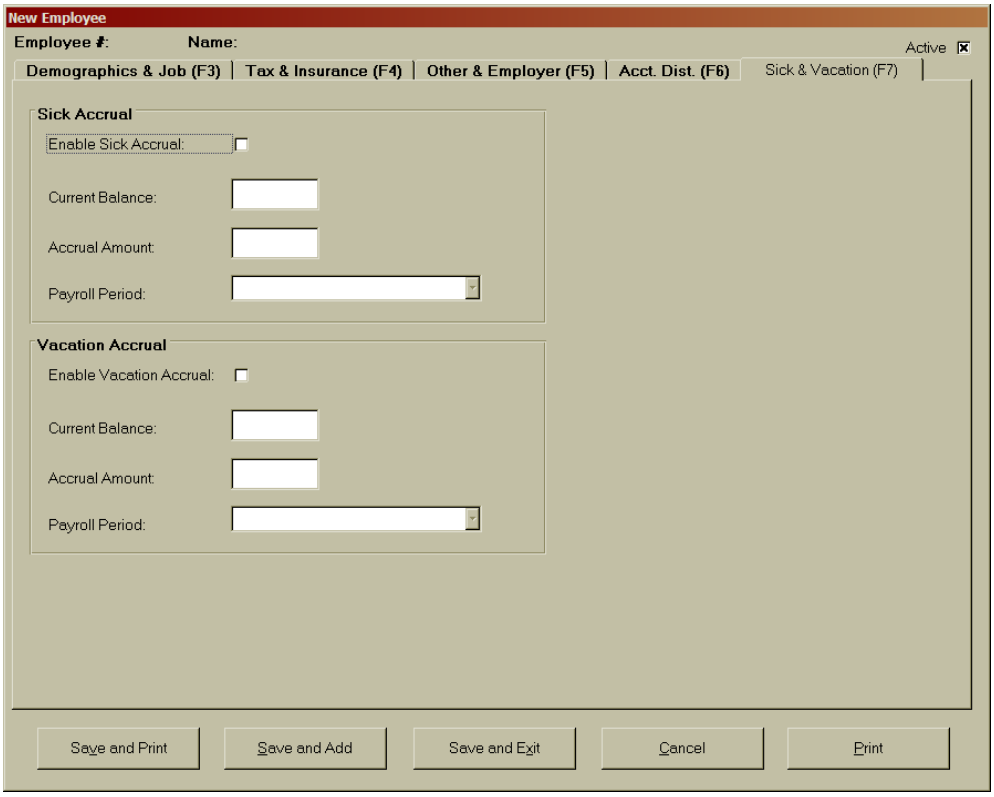
When this screen has been completed, you can click one of the buttons at the bottom of the screen or click on the Sick & Vacation (F7) tab at the top of the screen.

Users are not required to complete the Sick & Vacation tab. This tab is provided as an option for the cities or towns that provide these benefits. The following page provides details on entering Sick and Vacation Leave.

Employees: Entering Employee Information (continued)

Entering information into the Sick and Vacation (F7) Tab

This screen is for Employees who earn Sick and/or Vacation leave:



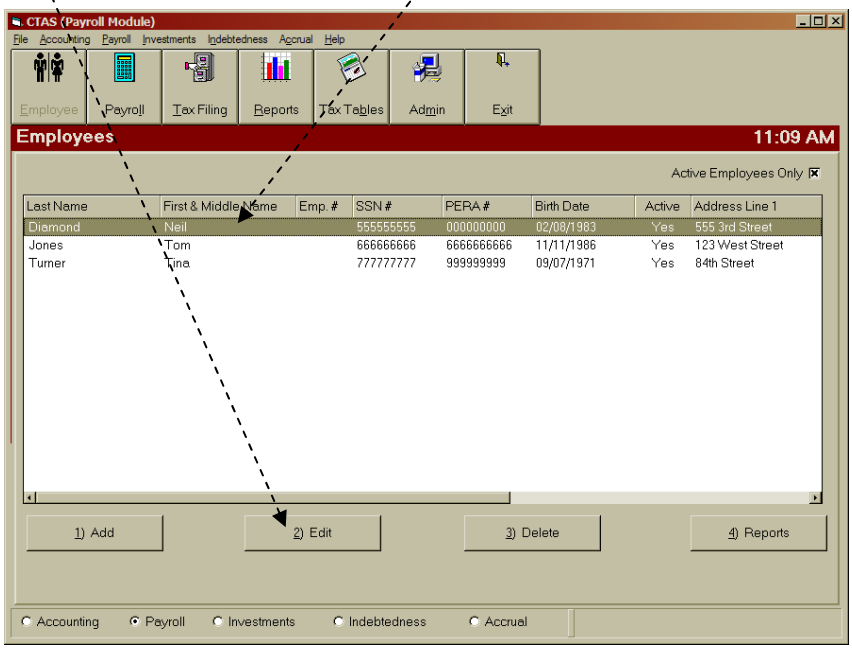
To enter the information on Sick and Vacation leave, complete the following steps:

- For sick leave, click the Enable Sick Accrual check box.
- If there is a current sick leave balance, enter the amount in the Current Balance field of the Sick Accrual box. Enter the Accrual Amount.
- Select the Payroll Period from the list by clicking the down arrow at the end of the Payroll Period Box.
- For vacation leave, click the Enable Vacation Accrual check box.
- If there is a current vacation leave balance, enter the amount in the Current Balance field of the Vacation Leave Box. Enter the Accrual Amount.
- Select the Payroll Period from the list by clicking the down arrow at the end of the Payroll Period Box.
- Click the Save and Add button to continue to enter information for more employees. When all of the employees have been entered, click the Save and Exit button.

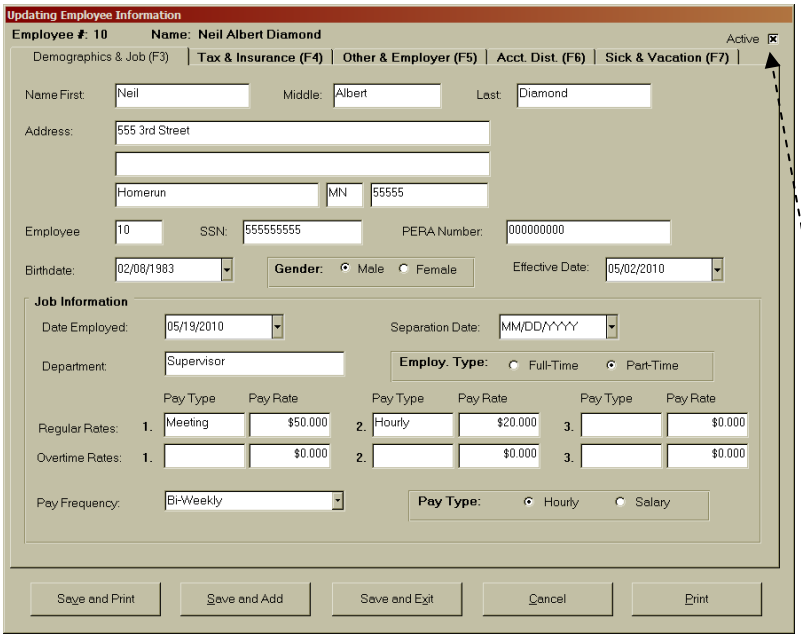
Note: The Pay Period field is to indicate when the employee earns the sick and vacation leave. The first through the fourteenth of the month is the first pay period; the fifteenth through the twenty-eighth of the month is the second pay period; and the twenty-ninth through the thirty-first of the month is the third pay period.

Employees: Changing the Employee Information

To change the information for an employee, highlight the employee's name and information and click the Edit Button on the Employees screen in the Payroll Module.



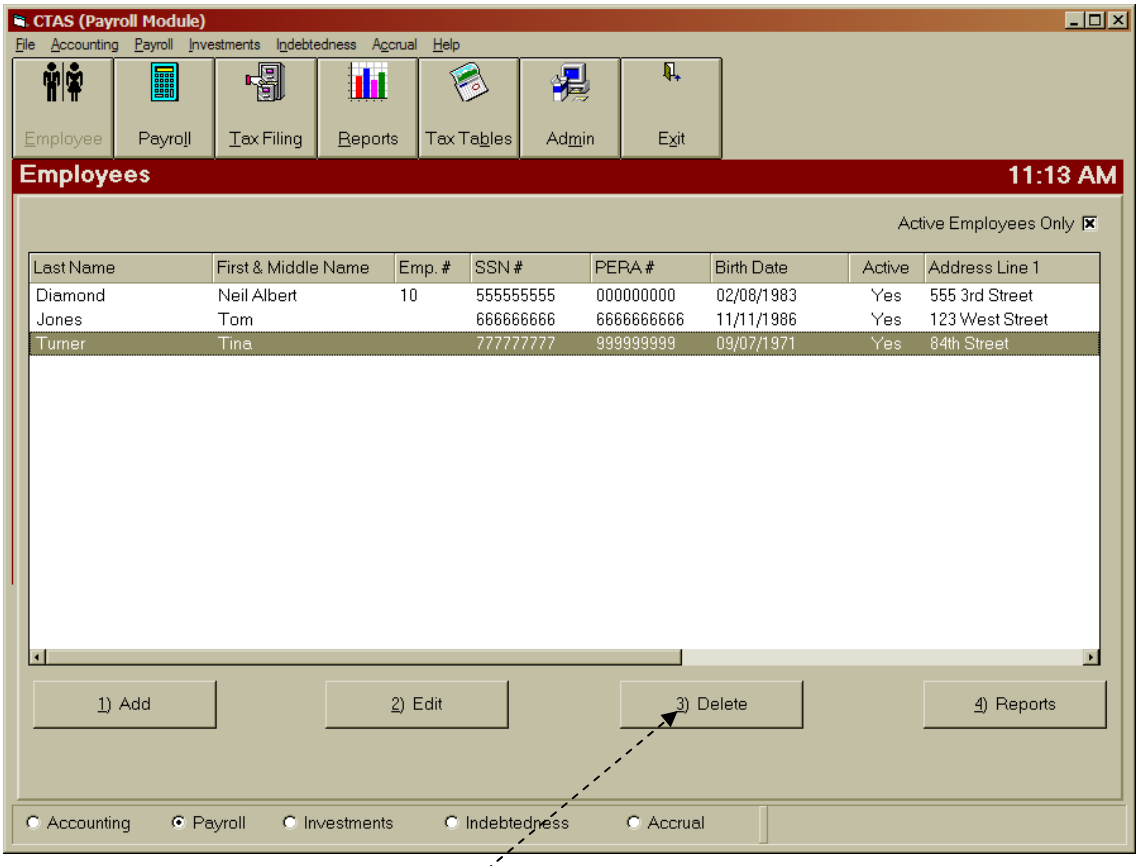
After the Edit option is selected, the Updating Employee Information screen will appear:



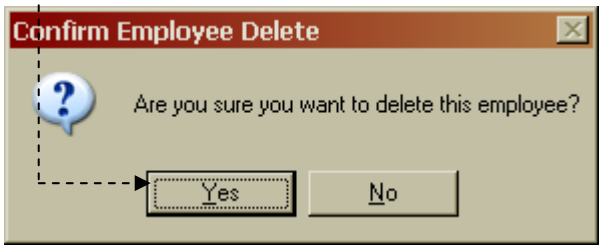
On this screen, you can change any field by clicking on the appropriate tab. The Active box indicates whether that employee is currently employed. By unchecking the box, the employee's information will not be displayed when selecting the employees to be paid.
Note: Any changes made to an employee's information will be effective for payrolls created after the changes were made.

Employees: Deleting an Employee

The need to delete an employee's information could result from a decision that there isn't a need for the person to be entered into the payroll system. You can only delete an employee's information if they are not included in any payroll period.

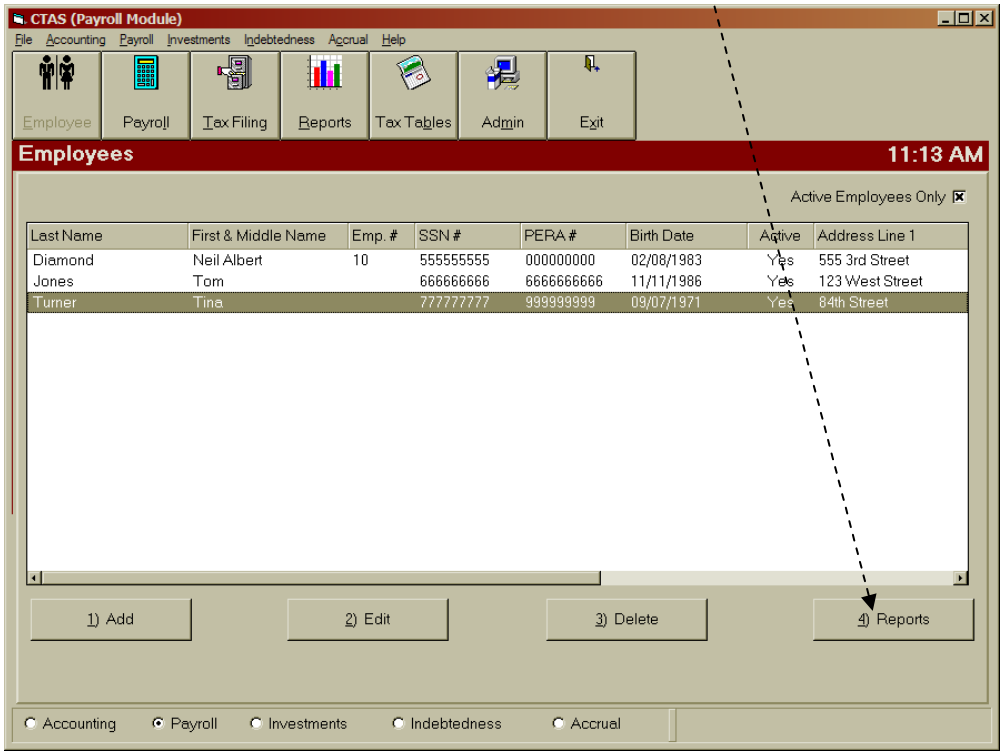

CTAS (Payroll Module)
File Accounting Payroll Investments Indebtedness Accrual Help
Employee
Payroll
Tax Filing
Reports
Tax Tables
Admin
Exit
Employees
11:13 AM
Active Employees Only
Last Name | First & Middle Name | Emp. # | SSN # | PERA # | Birth Date | Active | Address Line 1
Diamond | Neil Albert | 10 | 555555555 | 000000000 | 02/08/1983 | Yes | 555 3rd Street
Jones | Tom | | 666666666 | 6666666666 | 11/11/1986 | Yes | 123 West Street
Turner | Tina | | 777777777 | 999999999 | 09/07/1971 | Yes | 84th Street
1) Add
2) Edit
3) Delete
4) Reports
Accounting
Payroll
Investments
Indebtedness
Accrual

- To delete an employee, highlight the employee's name on the Employees screen and click the Delete button.
- After the delete option is selected, the Confirm Employee Delete screen will appear, (below, left).
- Click on the Yes button to delete the employee's information.
- You will then receive a screen message that indicates the employee's information was deleted (below, right). Click the OK button to complete the process.

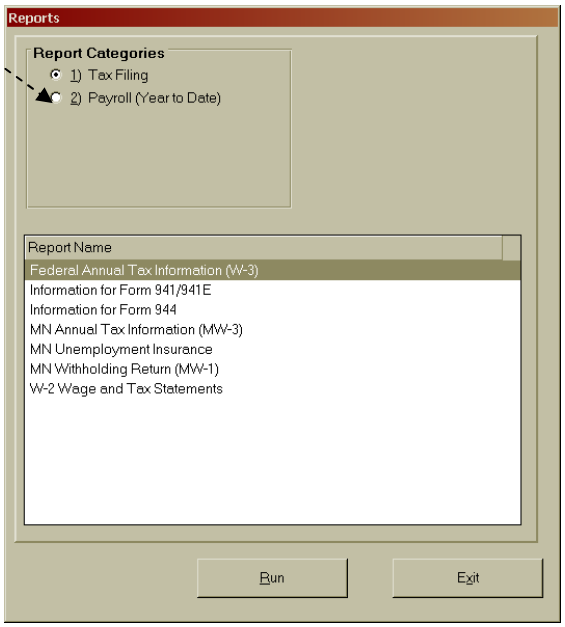


Employees: Printing an Employee's Information Report

To print an Employee Information Report, click on the Reports button at the bottom of the Employees Screen in the Payroll Module.

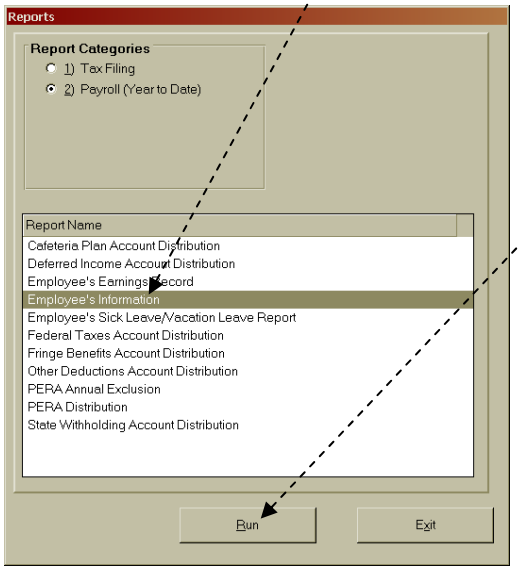


A Reports screen will appear, listing the reports available to assist you in filing your withholding tax information. To access the Employee Information report, click on the Payroll radio button. When you click the Payroll radio button, a different Reports screen will appear, as shown on the next page.

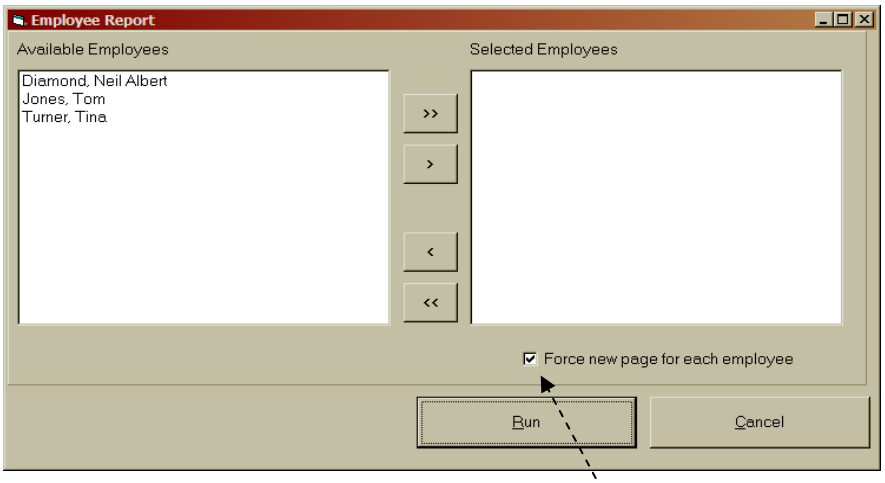


Employees: Printing an Employee's Information Report (continued)

To run the Employee Information report, highlight it from the list and click the Run button.



After clicking the Run button, the Employee Report screen will appear:

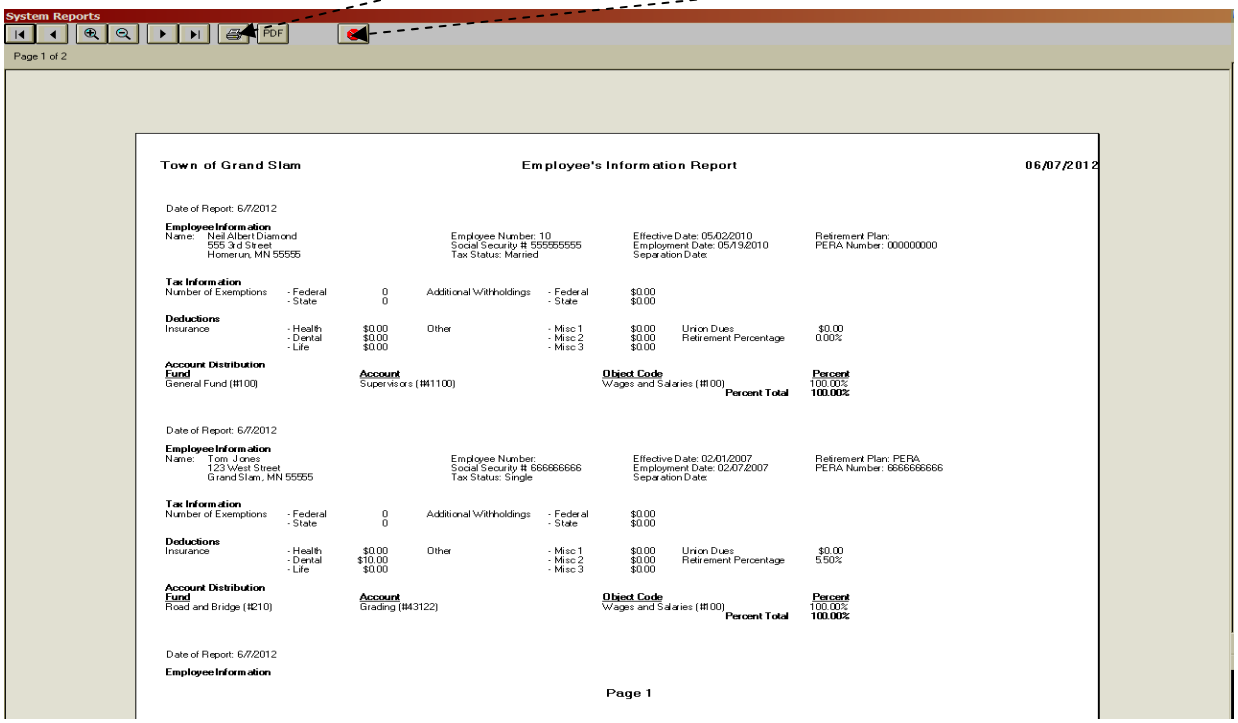


On the Employee Report screen:

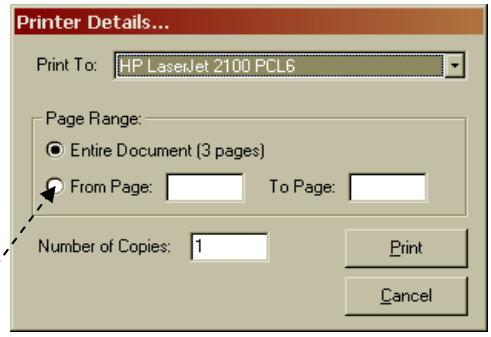
- Select the names of the employees whose information is to be printed by moving the names from the Available Employees box to the Selected Employees box. The ">>" button will move all the names and the ">" button will move the individually-highlighted name(s). You can also select an individual employee by double-clicking on the employee's name. The "<" and "<<" buttons move names back to the Available Employees box
- Select how you would like the employee information displayed. The default is a separate page for each employee. By unchecking the Force new page for each employee box, multiple employees will be printed on each page.
- Click the Run button and the print preview (System Reports screen) will appear, as shown on the next page.

Employees: Printing an Employee's Information Report (continued)

- After reviewing the preview, click on the Printer icon to begin the printing of the report. You can close the System Reports screen by clicking the red "X".



- After clicking on the Printer icon, the Printer Details screen appears:



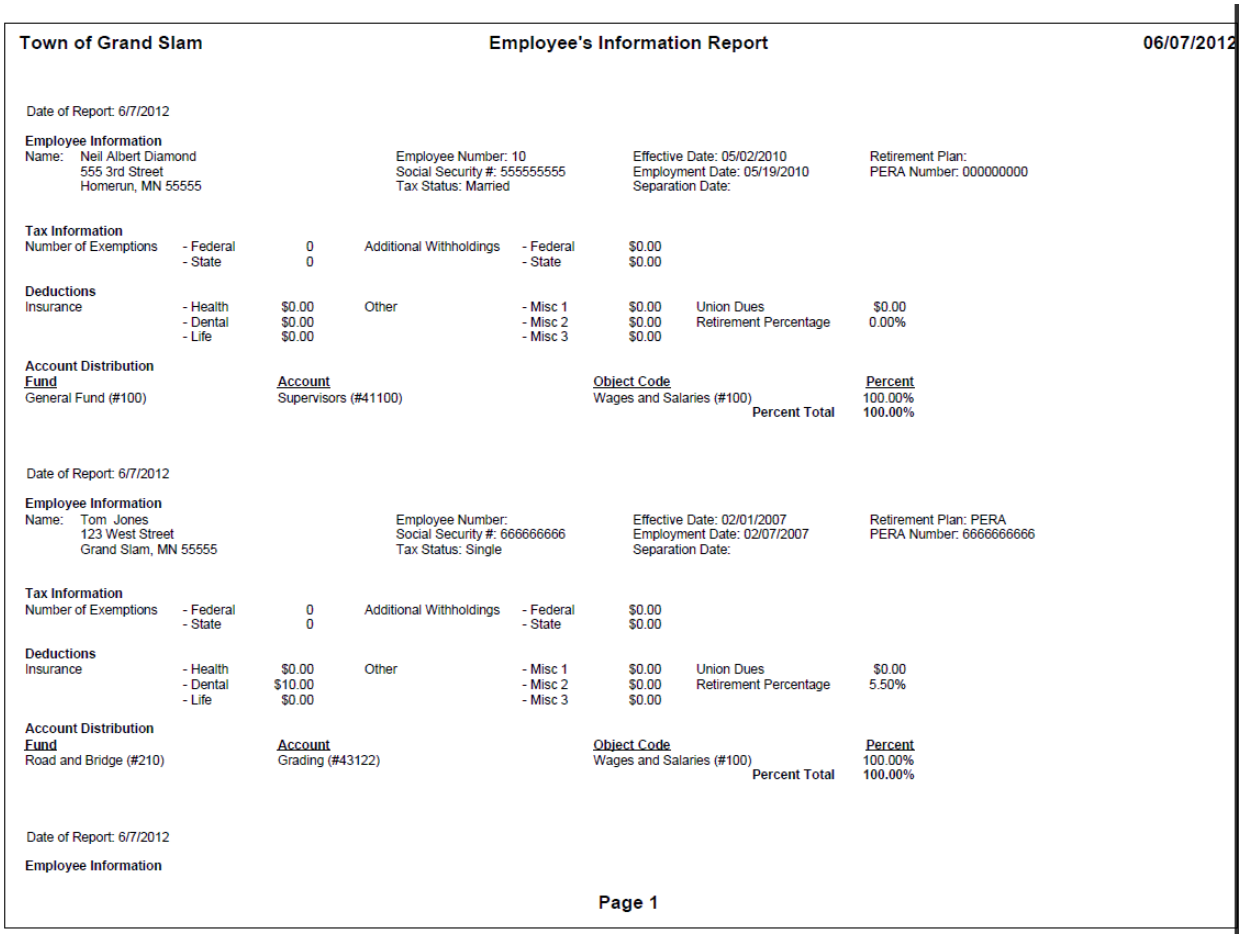
- The From Page radio button allows you to print only certain pages of the report. The Number of Copies box allows you to print the number of copies you choose. After selecting the printer details, click on the Print button to begin printing the report. The following page has a sample of the report.

To close the printing of the report:

- Click the Red "X" icon on the System Reports screen.
- Click the Cancel button on the Employee Report screen.
- Click the Exit button on the Reports screen.

Employees: Printing an Employee's Information Report (continued)

Sample Employee's Information Report



Town of Grand Slam — **Employee's Information Report** — **06/07/2012**

Date of Report: 6/7/2012

Employee Information
Name: Neil Albert Diamond
555 3rd Street
Homerun, MN 55555
Employee Number: 10
Social Security #: 555555555
Tax Status: Married
Effective Date: 05/02/2010
Employment Date: 05/19/2010
Separation Date:
Retirement Plan:
PERA Number: 000000000

Tax Information

Number of Exemptions	- Federal	0	Additional Withholdings	- Federal	$0.00
	- State	0		- State	$0.00

Deductions

Insurance	- Health	$0.00	Other	- Misc 1	$0.00	Union Dues	$0.00
	- Dental	$0.00		- Misc 2	$0.00	Retirement Percentage	0.00%
	- Life	$0.00		- Misc 3	$0.00		

Account Distribution

Fund	Account	Object Code	Percent
General Fund (#100)	Supervisors (#41100)	Wages and Salaries (#100)	100.00%
		Percent Total	**100.00%**

Date of Report: 6/7/2012

Employee Information
Name: Tom Jones
123 West Street
Grand Slam, MN 55555
Employee Number:
Social Security #: 666666666
Tax Status: Single
Effective Date: 02/01/2007
Employment Date: 02/07/2007
Separation Date:
Retirement Plan: PERA
PERA Number: 6666666666

Tax Information

Number of Exemptions	- Federal	0	Additional Withholdings	- Federal	$0.00
	- State	0		- State	$0.00

Deductions

Insurance	- Health	$0.00	Other	- Misc 1	$0.00	Union Dues	$0.00
	- Dental	$10.00		- Misc 2	$0.00	Retirement Percentage	5.50%
	- Life	$0.00		- Misc 3	$0.00		

Account Distribution

Fund	Account	Object Code	Percent
Road and Bridge (#210)	Grading (#43122)	Wages and Salaries (#100)	100.00%
		Percent Total	**100.00%**

Date of Report: 6/7/2012

Employee Information

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